MARINE ECOTOURISM — OVERVIEW

Prepared for:

Economic Development Branch
BC Ministry of Sustainable Resource Management

With the Generous Support of:

Tourism BC and Skeena Region (MSRM)

Prepared by:

Stuart Gale & Associates
10818 Deep Cove Road
Sidney, BC V8L 5M5
Tel: (250) 656-2024

Pierce Lefebvre Consulting
3705 West 18th Avenue
Vancouver, BC V6S 1B3
Tel: (604) 224-0648

January 2003

105-05522/

BUILDING BLOCKS FOR ECONOMIC DEVELOPMENT & ANALYSIS

PREFACE

PURPOSE

Building Blocks have been conceived and developed by the Economic Development Branch of the Ministry of Sustainable Resource Management, under the guidance of Nancy South, Manager Economic Analysis, as an analytical tool that supports British Columbia coastal and land and resource use planning and decision-making and economic development initiatives. The Blocks contain concise business and sector information for a broad range of resource-based business types in BC. At this point, there are more than 30 Blocks either complete or in draft form. Several more Blocks have been identified as high priority by planning tables and other client groups. Additional Building Blocks will be developed over time, and some Blocks may be updated. For the most current Building Blocks, please see the Ministry of Sustainable Resource Management website, at: http://srmwww.gov.bc.ca/rmd/ecdev/

ACKNOWLEDGEMENTS

Generous support in terms of both funding and staff time has been provided by the Ministries of Energy and Mines; Water, Land and Air Protection; Agriculture, Food and Fish; and Forests, as well as by Skeena and Coast Regions of the Ministry of Sustainable Resource Management.

BENEFITS

Building Blocks are expected to provide the following general benefits:

- Increase efficiency and more informed decision-making by providing readily accessible, credible information to planning and economic development processes;
- Improve the consistency of economic information across planning areas;
- Support economic analysis and decision-making that occurs outside formal coastal and land use planning processes; and
- Provide linkages between economic analysis and other social and environmental analytical tools (through identifying resource requirements to support economic activities and general compatibilities with other sectors and values).

LIMITATIONS

Every effort has been made to ensure that the information contained in Building Blocks is accurate and consistent. Approved, credible data sources are the foundation for Building Blocks. All Blocks were reviewed by sponsoring agencies and other experts. However, users are cautioned that information is used at their own risk, and that the authors and sponsors are not liable for any damages. Any conclusions or interpretations by the authors are not intended to represent government policy. Also, note that Building Blocks do not provide site specific information nor do they consider requirements for sustainability (social, community, environmental).

COPYRIGHT/REFERENCE

These Building Blocks are copyright to the Government of British Columbia, Ministry of Sustainable Resource Management, Economic Development Branch. See http://www.gov.bc.ca/com/copy/ for information regarding the copyright and to request permission to reproduce the Building Block documents.

RECOMMENDED REFERENCE/CITATION

BC Ministry of Sustainable Resource Management, 2003, Building Blocks for Economic Development and Analysis, *[Title of Sector]*. http://srmwww.gov.bc.ca/rmd/ecdev/

Acknowledgements and Disclaimer

Throughout this study the consultants, *Stuart Gale & Associates* and *Pierce Lefebvre Consulting*, received excellent cooperation from commercial operators in the ecotourism sector and from B.C. government representatives. We wish to thank everyone who kindly donated their time to answer questions, provide data and clarify issues. Without this help, we would not have been able to prepare this Building Block.

The purpose of this Building Block is to assist in estimating the socio-economic impacts of the ecotourism sector, and to serve as an analytical tool that will assist in supporting coastal and land use decision-making. While the consultants believe that the data contained herein is reasonable and credible, it should be applied only in the land use planning context and should not be used for any other purposes, such as the preparation of business plan projections.

In preparing each Building Block, the consultants have relied substantially on data, estimates and forecasts contained in various publications and on interviews with individual operators. The information was gathered under time and resource constraints and further refinement of the assumptions and estimates would no doubt be possible given more time and resources.

1.0 BACKGROUND AND DEFINITION OF ECOTOURISM

The Ministry of Sustainable Resource Management (MSRM) has commissioned *Stuart Gale & Associates* and *Pierce Lefebvre Consulting* to prepare a profile of the nature-based tourism / ecotourism sector in B.C. Referred to as a Building Block by MSRM, this profile will serve as an analytical tool that will support coastal and land use decision-making through economic analysis and economic development planning. The "Building Block" will provide a snapshot of an average business / operation with potential application anywhere in the province.

1.1 Definition of Ecotourism

Nature-based tourism / ecotourism is defined as travel to relatively undisturbed areas with the specific objective of admiring, studying and enjoying the scenery and its wild plants and animals as well as existing cultural features found in the area. Ecotourism may provide specific opportunities for learning and discovery, and in some definitions, includes a social and environmental ethic (i.e., protects and enhances the natural and human environment where ecotourism takes place).

Ecotourism travellers tend to be highly focused in their interests and pursue them with high levels of physical and mental rigor. They tend to combine physical activities such as hiking, trekking, cycling, and kayaking with a desire to learn about the natural and cultural environment.

For this study, ecotourism excludes outdoor activities that are primarily adventure based (i.e., outdoor activities that are primarily directed toward a physical activity providing a personal sense of thrill or exhilaration). Examples include downhill skiing, cross country skiing, heliskiing, catskiing, snowmobiling, windsurfing, surfing, mountaineering, ATV touring, hang gliding/parasailing, scuba diving, etc.

Cultural activities are not considered, as they are being addressed in a separate building block. In addition, hunting, fishing and guide outfitting are not considered as they are also being addressed through a separate building block.

Ecotourism activities have been sorted into two broad categories:

1. Marine Ecotourism
2. Land Based Ecotourism

This building block focuses on the marine ecotourism sector; land based ecotourism forms the basis for a separate building block.

© 2003 Ministry of Sustainable Resource Management
Economic Development Branch

1.2 Marine Ecotourism Activities

Marine ecotourism includes activities that are conducted primarily in a marine setting and involve marine resources or terrestrial resources that occur at that marine/terrestrial interface (e.g. viewscapes, terrestrial wildlife, etc.). Activities may include viewing, education/interpretation or photography of marine wildlife and environments. Aside from roofed facilities (lodges) these activities are provided through the following:

- Marine cruising including sailing, yacht and power cruising; and
- Sea Kayaking Tours

The marine tourism industry is much broader than what is referred to in this study as the marine ecotourism sector. In 1991, a study of the marine tourism industry in B.C. defined the sector as commercial operators offering a variety of marine products related to sportfishing and the coastal experience. The following table summarizes the sectors included in that marine tourism study and some key socio-economic impacts:

Table 1: 1989 Direct Economic Impacts of B.C. Marine Tourism Commercial Operators

	Number of Operators	Total Employment	Total Revenues ($ million)	PY per Operator	Purchase Cost of Assets per Operator
Sportfishing:					
Sportfishing Lodges	80	860	$60.5 million	10.8	$1.3 million
Overnight Charters	30	125	$8.7 million	4.2	$503,000
Day Charters	300	390	$8.2 million	1.3	$61,000
Marinas	165	1250	$101.7 million	7.6	$1.2 million
Sub-Total Sportfishing	**575**	**2625**	**$179.1 million**		
Coastal Experience:					
Power Cruising	70	430	$22.3 million	6.1	$608,000
Sail Cruising	50	215	$8.3 million	4.3	$430,000
Wildlife Viewing	50	175	$4.2 million	3.5	$38,000
Scuba Diving	20	70	$3.4 million	3.5	$115,000
Kayaking	15	75	$4.4 million	5.0	$240,000
Sub-Total Coastal Experience	**205**	**965**	**$42.6 million**		
TOTAL MARINE TOURISM	**780**	**3,590**	**$221.7 million**		

Note: Employment is expressed in Person Years (PY).

Source: The ARA Consulting Group, *Marine Tourism in B.C.: Opportunity Analysis*, 1991.

© 2003 Ministry of Sustainable Resource Management
Economic Development Branch

Tourism BC is conducting a major research project designed to measure the economic impact on B.C. of nature-based tourism operators and to initiate on-going tracking of the nature-based tourism industry in British Columbia. Phase 1 of the project aims to measure the size of the industry in terms of revenues and employment using a brief telephone survey and results are expected in the Spring 2003. Phase 2 of the project will aim to provide quarterly updates of the economic impact information and will be collected through a detailed survey of representative operators sometime in late 2003/2004. When complete, the Tourism BC results will be incorporated into this Marine Tourism Building Block.

This Building Block on the marine ecotourism sector focuses on two sub-sectors of the industry, namely multi-day sea kayak touring and marine cruising tours (sail and power).

This document is the overview of Marine-Based Ecotourism which is following by Building Blocks:

- **Marine Cruising Operators**
- **Sea Kayaking Tour Operators**

© 2003 Ministry of Sustainable Resource Management

BIBLIOGRAPHY

B.C. /Canada Economic and Regional Agreement, Guide Outfitters of British Columbia: Opportunity Analysis Final Report, 1988.

B.C. Ministry of Water, Land and Air Protection, BC Parks, Info Centre, Permits, wlapwww.gov.bc.ca/bcparks/info/permitoverview.htm, 2002.

Clover Point Cartographics Ltd., Geoscape Environmental Planners, Marlyn Chisholm and Associates and Sunderman and Associates, Forest and Fisheries Tourism Opportunities Study for the North Coast Forest District Project Report, B.C. Ministry of Small Business, Tourism and Culture, 2000.

Clover Point Cartographics Ltd., Nootka Sound Forest Recreation and Tourism Opportunities Study, prepared for the Nootka Sound Economic Development Corporation, 1998.

Clover Point Cartographics, Geoscape Environmental Planners, Lions Gate Consulting and Pinel and Associates, Forest and Fisheries Tourism Opportunities Study for Portions of the Campbell River and Port McNeill Forest Districts, Appendix D: Tourism Product Activity Profiles, 2000.

Economic Planning Group, Northern Vancouver Island Forest Recreation and Tourism Opportunities Study, prepared for the Regional District of Mount Waddington, 1997.

Economic Planning Group, Tourism Product and Sector Capacity and Utilization Analysis, 1996.

Hawkes, Suzanne, "Maple Leaf Adventures: Environmental Education on the North Pacific Coast", The Greening of Tourism, From Principles to Practice, A Casebook of Best Environmental Practice in Tourism, in cooperation with Industry, Science and Technology Canada-Tourism and Globe92, 1992.

Land and Water British Columbia Inc., Key Business Programs, Commercial Recreation, www.lwbc.bc.ca/forbusiness/commercial recreation, 2002.

Langley, Shannon, Viability Analysis for a Proposed Network of Ecotourism Operators in the Central Kootenay, Tourism Action Society of the Kootenays, 2001.

Lien, John, The Conservation Basis for the Regulation of Whale Watching in Canada by the Department of Fisheries and Oceans: A Precautionary Approach, Canadian Technical Report of Fisheries and Aquatic Sciences 2363, Department of Fisheries and Oceans, Central and Arctic Region, 2000.

Marlyn Chisholm & Associates et al., Tourism Opportunity Strategy for the Mid Coast Forest District of British Columbia, Final Report, prepared for the Ministry of Small Business, Tourism and Culture, 2001.

© 2003 Ministry of Sustainable Resource Management

Ministry of Tourism, The Economic Impacts of Tourism Industries in British Columbia, 1991.

Outdoor Recreation Council of BC, Adventure Travel in British Columbia, March 1988.

Price Waterhouse and ARA Consulting Group Inc., Tourism Industry Product Overview – Council of Tourism Associations of B.C., June 1996.

Roper Starch, Outdoor Recreation in America 2000: Addressing Key Societal Concerns, prepared for the Recreation Roundtable, 2000.

The ARA Consulting Group, Marine Tourism in B.C.: Opportunity Analysis, prepared for the Industry, Science and Technology Canada, Ministry of Tourism and Ministry of Regional and Economic Development, 1991.

Tourism British Columbia, The Value of Tourism, 2002.

Wave-Length Paddling Magazine, by Sue Handel and Alan Wilson, New Regulations Plague Paddling Industry, December/January 1999.

© 2003